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ANALYSIS OF THE COMPETITIVENESS OF THE HOME FURNITURE INDUSTRY IN THE VALENCIAN COMMUNITY.

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ABSTRACT: In the international economic context a series of changes which affect the behavior of industries are being produced. These worldwide variations are due, in part, to the so-called *globalization process*, which has modified the productive activity, enhancing the level of rivalry among firms, which generates an immediate consequence in order to respond successfully to this new situation: the necessity, for the industries to keep a high level of competitiveness. It is proven that there are competitive industries, with a high level of employment, with a high rate of production, with a high exporting ratio over the national sum, which conform the basis of regional and even national economies; and in which it is necessary to know their structure, why there is a competitive advantage, and, moreover, to study them from inside, how, who, and with what. From our point of view, in this way a global view of the working system will be obtained, that is to say, which aspects, both exogenous and endogenous, provide a competitive advantage to the industry .

Spain, and specifically the Valencian Community, possesses an exporting industrial base, structured around ceramics, shoes, toys, textile, and furniture industries considered as *strategic in the Valencian economic dynamics*. Another outstanding aspect of these sectors to take into account is their characterisation as *traditional industries*. Therefore, assuming the importance of these industries to the Valencian economy, the home furniture has been chosen to carry out a study of the competitiveness of the same.

The hypothesis to be contrasted is the following: **“In the Valencian Community, in particular in the areas surrounding the city of Valencia, a highly competitive cluster has been formed. The relationships established among its members, its knowledge intercommunication, the growth of productivity and the**

interaction produced in it, is what makes this industry a competitive and dynamic one.”

1.- APPROACH AND ANTECEDENTS.

The globalisation process of economy has modified the productive activity, enhancing the level of rivalry among firms, which generates an immediate reaction in order to respond successfully to this new situation: the necessity, for the industrial sector in a specific area, to keep a high level of competitiveness.

The actual expression *competitiveness* has an implicit meaning of progress and advance, although it is difficult to find an unanimous agreement on the definition of the term. In this paper, competitiveness is defined as the firms, industries, or nations' ability to achieve success against the foreign competitors.

Many authors have discussed this issue. In the last years, Michael Porter has introduced new points of view, since the publication of his book *Competitive Strategy*¹, in 1980. With the publication of this work, Porter provides a study tool of the industrial sectors and competition, merging the Industrial Economy specialists' points of view, who, according to the author, did not focus their studies towards the firms' interests sufficiently; and of the studies about strategic issues that help firms, that, being an area of vital significance for the latter, did not count with the analysis techniques.

In his following work, *Competitive Advantage*², 1985, Porter highlights the significance of acquiring a *competitive advantage* as a basis to successfully overcome the shifting conditions of the environment. The author discusses how to acquire and keep the competitive advantages. But it is with the publication of *The Competitive Advantage of Nations*³, in 1990, that he offers a global view. The author spells out the role played by the environment, the institutions, and the economic policies of a country in the competitive success of some industries. He introduces a model of study, employed later widely by the scientific community: *the diamond* (Porter, 1990, p. 108). Since then, more attention has been drawn to what he calls *cluster*, which will be the basis for later works (*Clusters and the New Economics of Competition*⁴, 1998).

Porter, in this work, shows a range of concepts that can be synthesised in some basic ideas. Nations do not strictly compete, but firms, which must take into account both innovation and continuous improvement, basic questions to sustain the competitive advantage. The author emphasises that international competitiveness is usually

produced in concentrated geographical industries, stating that not all the sector in a country can be competitive.

The theory developed by Porter mainly appoints the question on the external forces, on the analysis of the firm's environment. This author has brought in the analysis tools to understand why some industries obtain more benefits than others. The analysis of *the five forces* (Porter, 1990) provides the underlying structure to the industry, and to what degree the actual and potential competitors, suppliers, clients, and the substitutive products affect the benefits of it. It is a powerful tool to understand the relation between determined strategic actions and the obtained benefits, but, in itself, it provides little information about the direction's role, until which point the behaviour, the decisions and the management, the culture of organisation, affect the firm's profitability and benefits; in short, the firm's internal aspects.

It has been proven that there are competitive industries, with a high level of employment, with a high rate of production, with a high exporting ratio over the national sum, which conform the basis of regional and even national economies and in which it is necessary to know their structure, why there is a competitive advantage, and, moreover, to study them from inside, how, who, and with what. From our point of view, in this way a global system will be obtained, that is to say, which aspects, both exogenous and endogenous, provide a competitive advantage to the sector.

The home furniture industry has been chosen to carry out a full study of the competitiveness of the same, in order to answer the following question: ***Should the outstanding position of this sector be interpreted in the Valencian Community economy as a consequence of its exogenous and endogenous questions?, Do these firms, belonging to a traditional sector, follow any determined model of behaviour that explains its competitiveness at an international level?***

2.—THE HOME FURNITURE INDUSTRY IN THE VALENCIAN COMMUNITY.

2.1.- STRUCTURE OF THE VALENCIAN INDUSTRY.

The structure of the Valencian industry is very varied, with the predominance of the *traditional* sectors, constituted mainly by micro- firms, specialised in products of final consume and of a reduced technological content.

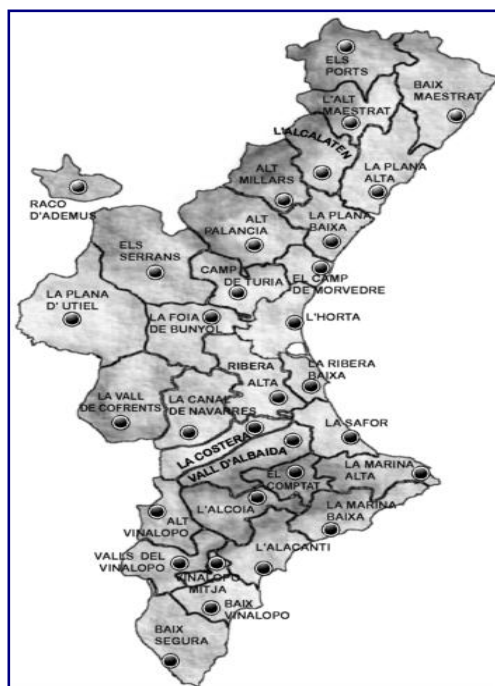
Nowadays, the industries with a greater specific weight in the Valencian Community are the ceramics, textile, shoes, chemical products, food and beverages, machinery, car, furniture, and wood and furniture, all of them with a strong implantation. The traditional Valencian industry has stood out for its exporting vocation, with higher rates than the national average (ICEX). Another of the main features of the structure of the Valencian Community is the low level of investment in I&D, with an added difficulty, the financing of this type of industrial investment is public above all (INE Data, Valencian Economics Conyucture). The scarce support to the I&D tasks from the firms' side, could be explained, according to Tomás Carpi⁵, in the small entrepreneurial dimension and in the kind of management, of the familiar type in a high percentage.

2.2.- GLOBAL VIEW OF THE HOME FURNITURE INDUSTRY .

The Valencian home furniture industry presents an important geographical concentration, most of the firms being localised in the regions of L'Horta Sud, L'Horta Oest, L'Horta Nord, el Baix Maestrat and la Costera, (See figure N°1) L'Horta Sud stands out among them, with a high number of firms in its neighbourhoods.

Firms of the furniture industry in the Valencian Community, are mainly devoted to the home furniture manufacturing, representing a high participation in the furniture industry in the Valencian Community against the national sum.

FIGURE N° 1. MAP OF THE REGIONS OF THE VALENCIAN COMMUNITY.



2.2.1.- FIRMS' TIPOLOGY.

The sum of the firms registered in the Valencian Community (May 2000) is 21,274, of which 49.3% are located in the province of Valencia, 38.6% in Alicante, and 12% in Castellón. Of this firms distribution is important to highlight that 82.4% are firms with less than 10 employees, as can be seen in table n° 1.

TABLE N° 1. FIRMS DISTRIBUTION IN THE VALENCIAN COMMUNITY.

Clasificación Nº empleados	Valencian Community		Valencia		Alicante		Castellón	
Small, e<10	17.528	82.4%	9.972	95%	5.145	62.6%	2.411	94%
Medium, 10<e<249	3.612	17.0%	435	4.7%	3.054	37.1%	123	4.8%
Large, e>250	86	0.6%	50	0.3%	20	0.3%	28	1.2%
TOTAL	21.274	100%	10.493	100%	8.219	100%	2.562	100%

Source: Our elaboration using BD SABE data

In the provinces of Valencia and Castellón, there is a clear predominance of the small firms, with levels of the 95% and the 94%, respectively, over the corresponding national rate, with a 64.7% of firms with less than 10 employees.

The firms belonging to the wood and furniture sectors at the national level are 10,316, although there are 2,244 firms devoted exclusively to the furniture manufacturing, 19% of which are in the Valencian Community (see table nº 2). As it can be seen in the table below, the manufacturing of kitchen and bathroom furniture, and the manufacturing of office and community furniture are not representative in the Community, with a 7.5% and 5.3%, respectively.

TABLE Nº 2. DISTRIBUTION OF FURNITURE MANUFACTURERS IN THE VALENCIAN COMMUNITY.

	FURNITURE MANUFACTURERS		KITCHEN AND BATHROOM	OFFICE AND COMMUNITY	HOME FURNITURES
Valencia	274	67%	12	14	248
Alicante	70	16%	10	4	56
Castellón	69	17%	9	4	57
TOTAL	413	100%	31 (7.5%)	22 (5.3%)	361 (87.2%)

Source: Our elaboration using BD SABE data

From the intertwined analysis of the data in the data base, the following conclusions can be drawn:

- Of the firms devoted to the furniture manufacturing located in the Valencian Community, 67% are in the province of Valencia.
- The home furniture manufacturing firms represent the 87.2% of the total furniture firms located in the Community, percentage that increases to the 91% in the province of Valencia.

Studying in depth the analysis of the home furniture firms located in the Valencian Community, the data drawn from their classification according to the size is presented in Table Nº 3.

TABLE Nº 3. CLASSIFICATION OF THE HOME FURNITURE FIRMS IN THE VALENCIAN COMMUNITY ACCORDING TO THEIR SIZE.

Clasification Nº employees	Comunidad Valenciana		Valencia		Alicante		Castellón	
Small, e<10	305	84.5%	230	92%	22	41%	53	95%
Medium, 10<e<249	54	15%	19	7%	32	59%	3	5%
Large, e>250	2	0.5%	1	1%	0	0%	0	0%
TOTAL	360	100%	250	100%	54	100%	56	100%

Source: Our elaboration using BD SABE data

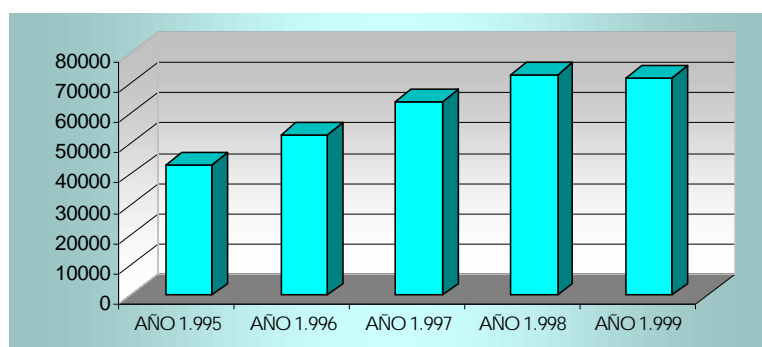
The industry of the home furniture manufacturing firms sustains, in the general basis, the same structure than the total firms in the Valencian group, that is to say, around 80% to 85% are small firms, around 15%-17% they are medium sized firms (note that 99.5% are PYMES) and the rest, are large. The high concentration of firms with less than 10 employees in the provinces of Castellón and Valencia is very significant.

2.2.3.- EXTERNAL COMMERCE AND PRODUCTION OF THE HOME FURNITURE IN THE VALENCIAN COMMUNITY.

The Valencian Community is leader in the home furniture production at a national level, followed by Cataluña. Indeed, it sustains its leader position in terms of exportations, consolidating itself as the first Spanish autonomy exporter of furniture, with figures close to the 70,000 millions of pesetas against the 16,000 imported products. The home evolution of the home furniture exportations in the last five years is presented in the figure nº 2.

As it can be observed in the graphic, the exportation of furniture from the Valencian Community has increased steadily, although in 1999 it suffered a small decrease (-1.54%).

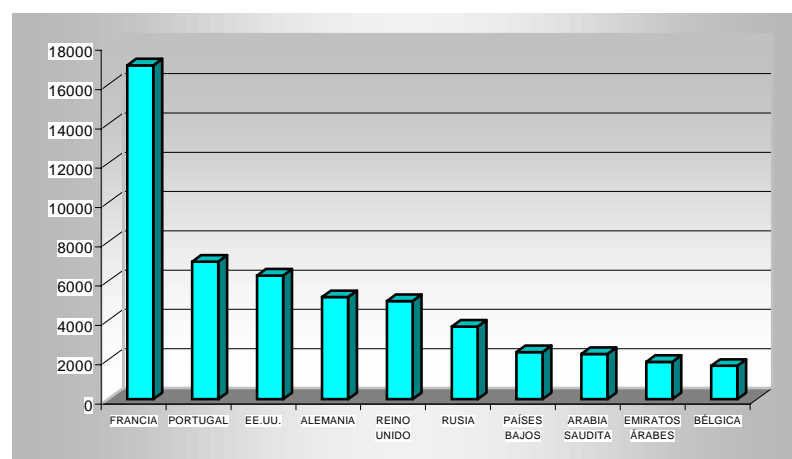
FIGURE N° 2.- FURNITURE EXPORTATION IN THE VALENCIAN COMMUNITY.



Source: Our elaboration with ANIEME data. – 1999 data, in millions pesetas.

The Valencian Community furniture is sold outside our frontiers and, although most of it stays in Europe, begins to be significant in markets with a high potential, like the United States. The destinations of the Valencian furniture are represented in figure n° 3.

GRAPHIC N° 3. DESTINATIONS OF THE VALENCIAN COMMUNITY FURNITURE.



Source: Our elaboration with ANIEME data. – 1999 data, in millions pesetas.

With respect to the level of innovation in the Valencian Community furniture firms, it is estimated that only a 12% of them carry out any task related to research and development (I&D) and that the implemented innovations come from external firms.

The following conclusions can be drawn from the above information:

- The Valencian Community is the leader autonomy at the national level both in the production and in the exportation of home furniture.
- 85% of the firms of the furniture sector have less than 10 employees (small firms), and 95.5% are PYMES (small and medium sized firms), with a familiar structure and with a non-specialised business management.
- The technological level of these firms or their level of innovation do not especially stand out.
- The Valencian Community does not present comparative advantages with respect to other areas with the predominance of the furniture industry.
- The firms manufacturing home furniture are located in specific areas, the regions of L'Horta in Valencia and el Baix Maestrat in Castellón, where the industrial investment in the furniture sector is also agglomerated.

What is therefore the key for the success of this industry ?, the following point of this paper tries to analyse this question through the establishment of the following hypothesis:

In the Valencian Community, and especially in the area surrounding the city of Valencia, a highly competitive cluster has been formed (Porter, 1991 and 1998). The established relations among its members and their knowledge interchanges is what makes this industry a competitive and dynamic one.

3. THE HOME FURNITURE CLUSTER.

3.1. – CLUSTER DEFINITION AND PERFORMANCE.

The specialised literature has written very often about the geographic agglomeration of firms in an industry. Sometimes there are terms with similar meanings, giving rise to confusion and creating the necessity of more precise definitions. Some of them are as follows:

- **INDUSTRIAL CLUSTER** (Porter, 1990, 1998), is a geographical agglomeration of firms with relations established among them (suppliers,

clients, technicians, etc.), related institutions and connected industries , that operate in a specific field.

- **REGIONAL CLUSTER (Enright, 1992)**, is an industrial cluster in which firms are geographically closely located, in the same industry o related ones.
- **INDUSTRIAL DISTRICTS (Brusco 1992, Beccatini, 1987, 1992)**, agglomerations of firms involved in independent productive process, very often in the same sector o related sectors, completely integrated in the local environment and even delimited by the everyday distance to work.

The meaning used in this paper corresponds to the first one, Industrial Cluster, developed by Porter.

According to this model, the competitive industries are not constituted by isolated firms, but are located in a specific geographical area, where clients, suppliers, public and private institutions, entrepreneurial organisations, etc., coexist together with the firms, all of them interrelated in one way or another (through the productive processes, technologies, suppliers or raw materials). In this framework of relationships, the ability that a firm may have to innovate and improve will greatly depend on the established relations among all the named factors, the related and auxiliary industries, the national or regional demand (depending on the case subject to study), the competence, the firm's structure, etc., all of them factors of the "local" type, that is to say, the environment surrounding the firm.

The physical closeness of the suppliers, of the demanding clients, of the competitors, helps transfer specific information among them in a more effective way, more fluid. Moreover, the geographical agglomeration helps to sustain work contacts and exerts a greater pressure with respect to innovation.

According to Michael Porter (1998), one of the essential premises to be competitive is the environment's dynamics of the firms. The organisation and participation in fairs and congresses of the industry , the joint research through entrepreneurial organisations and technological institutes, the exporting vocation, etc., are clear symptoms of the dynamics of the industry , promoter of its own competitiveness. The environment will "push" the firm to move with it, in the same way that a drowsy environment, with little impetus, will lead firms towards passivity. The

local and regional economies are closely related to the “clusters” and with their ability to innovate and improve. This paper tries to show the suitability of this model to the Valencian Community home furniture industry .

4.- CONTRAST FROM THE “CLUSTER” COMPETITIVE MODEL TO THE VALENCIAN COMMUNITY HOME FURNITURE INDUSTRY .

The model establishes that there are four factors that directly influence the firms’ competitiveness; *the factors’ conditions, the demands’ conditions, the suppliers and the related industry, and the strategy, structure, and rivalry*, each one influencing the others, conforming, in this way, a dynamic system of performance.

4.1.- CONDITIONS OF THE FACTORS

In this point, the basic factors of production as well as the specialised factors are included.

In the Valencian Community home furniture industry , there are the following conditions of the factors that help competitiveness:

- The presence, in the area, of a qualified labour force, workers with a wide experience in the sector.
- Specific training: vocational training (DEP, Technologies in the Furniture industries Diploma, MOE, Vocational Module in Specialisation and Valencian Network of Institutes of Vocational Training), courses of continuous training (AIDIMA, IMPIVA, MINER, Chamber of Commerce, etc.).
- Institutions dedicated to research and the promotion and development of the technological level of firms, of the technicians, and the level of the quality of the products:
 - AIDIMA, Technological Institute of Furniture.
 - ANIEME, National Association of Industrial and Furniture Industry Exporters.
 - FEMAVA, Furniture Entrepreneurs Valencian Federation.
 - AFEMMA, wood products, machinery, and equipment Spanish manufacturers Association.

- Promoting instruments: International Furniture Fair (FIM), International Wood Machinery Fair, FIMMA., International Wood and Furniture Industry Suppliers Fair, MADERALLA, Conjuncture National Congress, COSMU, different Publications, etc.

There is close collaboration with the Valencian Generalitat, an example of this formulation is RIMASA, an association created by the businessmen of the wood and furniture sector in the Valencian Community. It is a public capital association, linked to the Environment Government Office with the purpose of managing the sector's waste.

4.2.- THE DEMAND'S CONDITIONS

The characteristics of the local demand greatly influence the industry's competitiveness. The demanding clients push firms to continuously improve their products and services, to innovate in order to keep the standard of quality established and demanded by buyers. These requirements established by the local demand are much more evident than the ones fixed by clients external to the performance ratio of these industries. The international clients have more difficulties to influence the productive firms.

The per capita consumption of furniture in Spain is in the first position among the countries in the European Community with 94 Euros per inhabitant, although a significant aspect is the strong exporting orientation of firms, being the international demand and the hard competence basic aspects that determine the industry's quality and innovation.

4.3.- RELATED AND SUPPORTER INDUSTRIES.

The competitive related industries is the third determining factor of an industry competitiveness. The presence of competitive suppliers in the country or region, provides a fast and secure access to the products. Moreover, there is a fluid information interchange between suppliers and clients, which allows the adaptation to changes and innovation in a short period of time. If this suppliers work at the international level, as it has been said, the most actual and dynamic information of the industry will be

available to them, because they are the transmission via themselves. In many cases, it is possible to raise joint research programs and a close collaboration from which both parties come out strengthened.

In the case of the home furniture, we find a high implantation of firms of panel-boards/veneers, of varnish and ironwork in the area.

The machinery used by firms mainly comes from Italy and Germany, although the machinery sub-sector for the home furniture industry has also a certain presence in the Valencian firms. Although most of these manufacturing firms are located in foreign countries, they have a local office in the area of Barcelona or Valencia, reducing, in this way, the distance between both industries.

A great variety of specialised service firms in the furniture industry are located in the province of Valencia: design of facilities, processes control and automation, advisories, occasion machinery, selective recollection of wastes (sawdust, shaving, solid wastes), etc.

4.4.- STRATEGY, STRUCTURE AND RIVALRY.

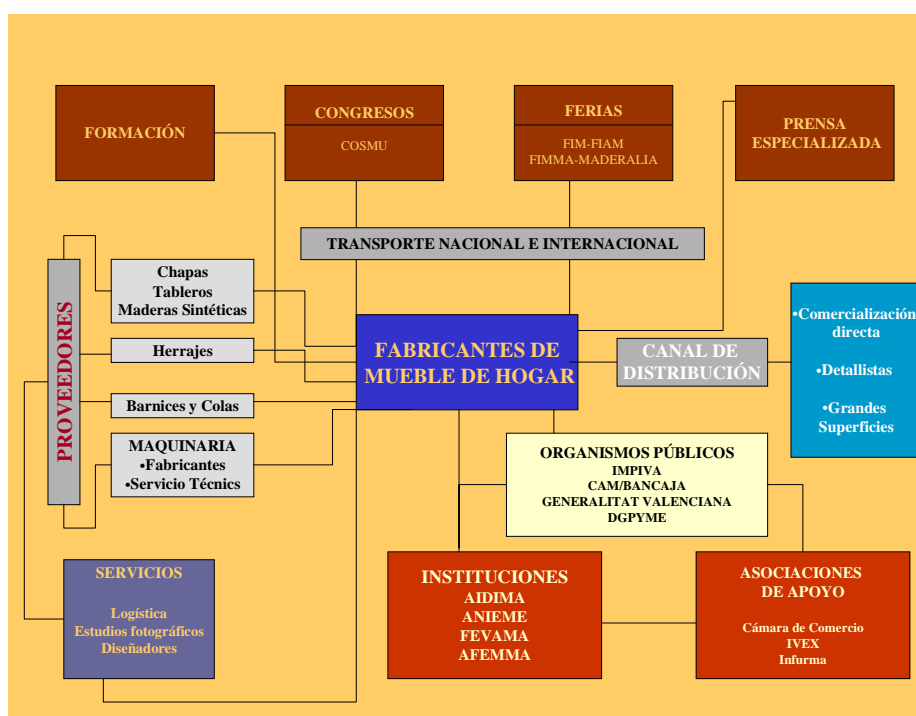
In the industries' environment, the firms' creation systems, the legal form they adopt, the business culture that rules in the industry, the predominant organisational systems, the managers' training, etc., are aspects that influence the industry's competitiveness. Although it is clear that not all firms perform or are organised in the same way, there is a general environment when the firms are geographically close and belong to same industry. In the discussed industry, it is easy to find operators that have worked in different firms of the industry, the way of working and performing is easily transferred by the labour force; 85% of the Valencian Community firms of the industry have less than 10 employees, they are firms of the familiar type, what influences the industry's culture, in fact, they are considered as *traditional* in the region's economy.

In the case of the furniture sector, the rivalry among firms has been a basic factor in promoting the competitiveness among the firms of the industry. There is a short distance among them and it is known who carries out any innovation, even the introduction of a small change in the productive process. The strong rivalry helps competitiveness. According to a recent research, the Valencian Community furniture

industry is one in which the creation of new firms from the already established ones is very significant, encouraging competitiveness.

In the following figure (Figure N° 4) the furniture cluster's structure with its main integrated agents is represented.

FIGURE N° 4 HOME FURNITURE CLUSTER.



Source: Our elaboration

5.- CONCLUSIONS

The Valencian Community is the leading autonomy at the national level, both in home furniture production and exportation; 24% of all the manufacturing firms are located in this region, producing 25% of the national sum and exporting a total of 65,000 million of pesetas. One of the outstanding features of the firms is that 85% of the firms belonging to the furniture industry have less than 10 employees (small firms), and that 95,5% are PYMES, with familiar structures and with a non-specialised business management. These firms' technological level does not especially stand out, and neither do their level of innovation. The Valencian Community does not present comparative advantages with respect to other communities, concerning the labour

force's cost, or the raw materials' proximity. It should be taken into account, that the home furniture productive firms are located in specific areas, the regions of the Valencian L'Horta and the Baix Maestrat in Castellón, in which the industrial investment in the furniture industry is also concentrated.

In the present paper, an analysis of the furniture industry at different levels has been carried out, which allows us to state that this industry enjoys a privileged position in the Valencian Community. The research has been carried out from an exogenous point of view, analysing and interpreting the available data, which leads to the to the sector's knowledge in a way that allows us to state that, at the structural level, the firms located in the Valencian Community, and especially in the areas surrounding the Valencian city, constituted a highly competitive cluster. The established relations among its members, their knowledge interchanges, explain its dynamics and its actual favoured position.

It has been interesting to see how the local institutions (universities, commerce chambers, entrepreneurial associations, technological institutes, financing entities, etc.) adapt themselves to cover the industry 's necessities, and to support it, and how the strong competence facilitates the appearance of specialised suppliers and new related firms.

Therefore, in these intertwined relations, the capability that a firm may have in order to survive, to improve and to be competitive, will greatly depend on the established relations among the named factors, on the related and auxiliary factors, on the national or regional demand (depending on the case subject to study), on the competence, on the firm's structure, etc. If a more exhaustive analysis of these factors is carried out, it can be observed that all of them are local, that is to say, they are related to the cluster.

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